

Montana Shared Catalog

Frequently Asked Questions

Q: What's the primary value of being an MSC library?

A: By working in partnership with other MSC libraries, you will have the opportunity to more efficiently provide higher value services and better quality content to *your library's users*.

Q: Who is the Montana Shared Catalog?

A: The Montana Shared Catalog is a voluntary consortium comprised, as of Dec 1, 2008, of ninety libraries and branches. MSC libraries are found in fifty-seven Montana communities, serving a combined population of approximately 450,000 and over 250,000 registered users.

The MSC currently includes three academic libraries, forty-six public libraries and branches, twenty-nine school libraries, and twelve special library members, stretching across the state from Troy to Miles City and Darby to Froid.

Q: Where are these libraries located?

A: Sixty-seven are in Western Montana (75%), ten in Central Montana (12%), nine in Eastern Montana (10%), and four (3%) on the Hi-Line.

There are several other shared catalogs in Montana: The Hi-Line Catalog, OMNI headquartered at MSU, the Montana Public Access Catalog at the U of M, and the Billings and Missoula school districts.

Q: How many librarians are employed in MSC libraries?

A: 358 as of Dec, 2008. MSC librarians work together on MSC-related issues; in many ways you are gaining a large virtual staff at the same time as you and your staff becomes part of the consortium.

Q: Who, actually, is driving the MSC?

A: State Library staff work to make the MSC the best shared online library catalog it can be. Having said that:

- Policies are set by the membership, in partnership with MSL
- Budgets are set by the membership, in partnership with MSL
- MSC members assist with training and ongoing support. Training conducted by members that have been designated and approved by MSC administration will have travel expenses reimbursed by the MSC.
- Decisions about implementation details (cataloging, circulation, look-and-feel, etc.) are made by membership committees. The MSC membership has final approval on annual budgets and system operations.

- Q: What application and computer hardware does the MSC run on?
A: We use SirsiDynix's Symphony integrated library system. Patrons and students access the catalog via the state-of-the-art, Symphony "eLibrary" online public access catalog (OPAC). Library staff have a workstation based client called "Workflows" that interacts with the Helena based servers. Director's Station is a web-based application that runs on its own server, allowing library directors and staff to query the system's history logs and database for statistical information on circulation, cataloging, acquisitions and user activity.

The catalog runs inside the State's wide area network on two RS/6000 IBM UNIX (AIX) servers; p650 (production) and p615 (development). A large storage area network (SAN) provides hard disk storage. A run-time version of Oracle is the database underlying Symphony and Directors Station.

The MSC server and data communications environment are designed to be as industrial strength (in terms of speed, reliability, robustness, and recovery in the event of a problem) as we can afford to make it. This costs money and requires a fair amount of expertise to maintain and operate. We believe we have, in partnership with the State's Information Technology Services Division, that expertise.

- Q: Who fixes the MSC when it breaks?
A: MSC staff fixes stuff when it's broken, and tweaks stuff when it's not. You don't have to have on-site staff people to keep your library's online catalog functioning, the servers are housed and maintained in the Montana State Library in Helena.

Our goal is that the MSC is available 24/7 to your staff and users, except during scheduled downtime for upgrades, large record loads, and maintenance. For scheduled and unscheduled downtimes, MSC libraries have access to the Symphony system's Offline feature, to circulate materials if the server becomes unavailable.

The system's up and down times are tracked and are available at http://msl.mt.gov/For_Librarians/Montana_Shared_Catalog/Members/incident_display.asp

You may need on-site staff people to keep your local area network running smoothly, your workstations online, and local servers running smoothly.

- Q: Why should my library join? What's the best part of being a MSC consortium member?
A: The good company you keep and what it lets you do for your patrons. Membership in the consortium is a great opportunity for Montana libraries to improve, through collaboration and cooperation, their delivery of quality library materials and services to their users.

Some MSC members are sharing patrons, materials, and beginning to talk about ways in which they might help each other stretch their materials purchasing budgets. Perhaps most significantly, MSC members share their smarts and imagination—can you imagine having 300 plus brains to pick when you have a problem or a bright idea?

- Q: What are some of the drawbacks of being part of the MSC?
A: Once you join the MSC, you've made a long-term commitment. The expense of exiting the MSC is fairly substantial and would be borne by the library wishing to do so.

You share your library's catalog with over 90 other libraries. It has to work for all. Working in a consortium requires that you and your library commit to communicating with other MSC members, to making operational and financial compromises, and to occasionally sharing in the consequences of decisions that lack immediate benefit for your library.

- Q: How is the MSC financed?
A: All of the annual operational funds come from member libraries. The State Library provides server hosting, generator backup and network access, 2.5 FTE operational staff and office space. The servers themselves are owned by the MSC membership. The State Library may provide start-up financial assistance to libraries joining the MSC.
- Q: What is the MSC budget?
A: The current MSC budget is available at http://msl.mt.gov/For_Librarians/Montana_Shared_Catalog/Members/Budget/budget.pdf
- Q: Is there a MSC business plan?
A: The *MSC Business Plan* details MSL's history and future plans and is currently undergoing review and will be posted on the MSC website by July 1, 2009.
- Q: How are MSC-related decisions made?
A: Consortium members make every effort to reach decisions by consensus, in the spirit of cooperation. In the event that consensus does not occur, a 75% majority of the membership present at a membership meeting or voting electronically is required. An MSC executive committee, with input from operational standing committees, attend to operational decisions which are then presented to the membership for approval. The Montana State Library Commission makes some funding decisions, with advice from the State Librarian and the Network Advisory Council.

Your library has an equal voice in all the policy and financial decisions affecting the consortium. All membership and committee meetings adhere to Robert's Rules of Order and approved MSC By-Laws. The by-laws are reviewed regularly with changes voted upon by the membership.

- Q: How much does it cost to join the MSC?
A: Start-up costs range from \$1,500 to many times this figure for large already-automated libraries. Montana-specific start-up costs have been negotiated with SirsiDynix, toward the goal of making the MSC affordable for all but the very smallest of Montana's libraries. A competitive MSC-start-up assistance program helps libraries afford the initial license and data-related expenses of joining the MSC. Start-up costs not associated with direct vendor costs such as: peripheral equipment (receipt printers, barcode scanners, barcodes) and new library training are paid by the library and included in the start-up cost estimate. The MSC Director will supply your library with two cost estimates: a start-up and an ongoing cost estimate.

The MSC is a bargain if you compare the costs of being a MSC library with running your own system. The initial and ongoing out-of-pocket and capital costs, combined with the time it takes to run a local system, and the value of librarians' time spent on computers instead of users, all add together to make owning your own system an expensive proposition.

A careful accounting reveals that the costs of being a MSC member are equal to or less than the costs for having a standalone integrated library system.

Q: What is the annual cost of remaining a MSC member library?

A: Annual ongoing costs range from \$675 to many times this figure for larger libraries. Contact the MSC Director for an estimate of your library's anticipated costs. MSC membership requires enrollment in OCLC which is an additional annual cost for the library if they are not already enrolled.

All libraries pay as little as possible, given the costs of running the MSC. Libraries with larger collections, more users and higher yearly circulations pay more than libraries with smaller title, user and circulation counts. The smallest libraries receive an additional title, patron and cost share break. Our intent is to use a measure that equitably distributes the consortium's annual costs among MSC libraries, based on the record counts from the system on March 1, each year.

Q: What are the consortium's typical ongoing costs, and how much will they be in future years?

A: The consortium's typical ongoing costs include SirsiDynix software support, e-Library content, Director's Station licensing, hardware maintenance, test server support, authority maintenance, catalog cleanup, server room location costs, server replacement fund, training, meeting and conference costs and half the cost of the MSC assistant position. The total shared costs for FY09 are \$219,761. Ongoing costs can be expected to increase by approximately 5% yearly.

Q: How is the ongoing cost figured?

A: A library's individual contribution to the ongoing costs of the MSC is determined by group consensus; every library has an equal vote. MSC's primary concern is to keep prices fair and affordable for all participating libraries (big and small, but taking special care to keep smaller libraries enfranchised), while meeting its financial obligations.

The MSC ongoing cost formula is based on four measures. Those measures are: title (30%), circulation (10%) and patron (30%) counts that come directly from the system. The remaining 30% is divided equally among libraries. Title, user and circulation record counts are done by system administrators on March 1 each year in order to create the next fiscal year's ongoing cost formula. Member libraries are invoiced by June of each year. The ongoing cost for libraries joining the MSC in the previous fiscal year is pro-rated the first year, based on the month their library policy was created in the system.

The following breaks are included:

- i. Title record break – libraries with under 10,000 titles records receive a 5,000 title break
- ii. Patron record break – libraries with under 3,000 patron records will not be charged for patron records
- iii. Equal share of 30% - libraries with under 8,000 title records AND under 1,000 patron records will pay a lower percentage that equals 1% of the 30%. The other libraries share the remaining balance equally.

The price structure strives to provide all libraries with a good deal, but takes exceptional care that it doesn't price large, medium or small libraries out of the catalog. It is a delicate balance that is annually reexamined by the group.

Q: How is the MSC staffed?

A: Federal funds pay for the MSC Director position and the Information Specialist position. The MSL Commission has agreed to split the cost of an additional position with the MSC membership. That position is the MSC Systems Support Technician. This person provides training and support to existing members, and has primary responsibility for adding new MSC members.

Staff from member libraries often works with one-another to solve problems, and on occasion, train other librarians. While they are not MSC or State Library paid staff, their contributions are a vital part of the mix.

Q: Can libraries form sub-groups within the MSC?

A: Yes. Public libraries with branches present a system-wide catalog to their users. Flathead-area libraries present a multi-type 'visage' to Kalispell library users. School and agency libraries have the option of displaying their district's holdings as their default catalog.

Eleven libraries are part of the "MSC Partner" sub-group and another eight are part of the "MSC 4 Rivers" sub-group and four others make up the BridgerNet sub-group. These sub-groups share books and patrons, and stitch their partnership together with the MSC and delivery services. The Partners and BridgerNet groups also offer floating collections of new fiction, popular fiction, audio and video recordings to their patrons. These items remain on the receiving library's shelf until needed elsewhere, giving the local libraries a "new" set of materials to offer their users on a rotating basis. This has made their patrons very happy.

Q: Need we join the MSC Partners, MSC 4 Rivers, or BridgerNet libraries when we join the MSC? Can we join these libraries later?

A: No, you don't have to join a sub-group when you join the MSC. If you decide you wish to join a group or groups later, your library must explore this first with the sub-group. Libraries are encouraged to inquire about joining the MSC Partner, 4 Rivers or BridgerNet groups, but they should know that there are circulation-policy and significant logistical details that must be worked out beforehand.

- Q: Can my library customize the public web view of the MSC catalog?
A: The MSC catalog is available to anyone, anywhere, anytime, through internet access and a web browser. Our desire to customize the catalog to your library's unique needs and preferences is tempered by finite staff resources and the capabilities and limitations of the SirsiDynix Symphony application.

The "e-Library" range of interfaces (ibistro, iLink and future portal solutions) is the web interface available to your users. Their friendly Amazon-like web interfaces include content such as: book jackets, table of contents, excerpts, and book reviews. This content is licensed from a 3rd party vendor in partnership with SirsiDynix. Your library's share of this consortium-wide cost is part of your ongoing expenses.

Some of the look-and-feel of the MSC system can be customized for your library; other aspects are determined by consortium-related requirements and cannot be changed to meet your library's needs.

- Q: What data can I migrate from my existing system?
A: Bibliographic and item level data migrates well if it is in standard MARC format. Patron information can be migrated. Some libraries use this opportunity to reregister their patrons in the new system. Patron data in standard flat-text files from student-data or similar systems can usually be migrated. Circulation, serials control and acquisitions data is problematic to migrate and we do not attempt to migrate these types of data.

Selected libraries will begin a three to six month process of adding their records to the MSC. This process will include training timed to meet the needs of new libraries coming online. Within three to five months, selected libraries' catalogs will typically be available over the Web, and libraries will begin to circulate items using the MSC system.

- Q: Can we use the MSC to build our bibliographic and patron data files? We have no electronic data files; instead we use a card catalog.
A: Yes, the MSC is a great tool to use to create an electronic duplicate of your card catalog. We can help you estimate how long it might take to get the job done. Libraries not migrating bibliographic data are required to enter 80% of circulating collection no later than one year after joining the MSC.

- Q: Why is a collection management policy required?
A: Collection management policies are a prerequisite to maintaining a useful collection. Accordingly, the Montana State Library Commission requires grant seeking libraries to have a collection management policy in place and on file at the Montana State Library.